Here to give the UK seafood sector
the support it needs to thrive.

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Seafood Consumption (2024 Update)

A market insight analysis (20m read)

R. Watson

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Seafood Consumption (2024 Update)

Understanding top level consumption is essential to monitor the health of the UK seafood industry, and benchmark seafood consumption against the two portions a week recommended by health professionals. The Defra Family Food dataset is the UK seafood consumption benchmark. This dataset offers the best insight into long term seafood consumption trends and tracks seafood eaten both 'in home' (which includes retail purchases and takeaways eaten in home) and 'out of home'. As the Defra Family Food dataset runs two years in arrears, NielsenIQ and CIrcana data can be used to get an up-to-date picture of the retail and foodservice respectively.

Key consumptions trends for 2024

1 Defra Seafood consumption benchmark falls -7.7%.

Total UK seafood consumption, both in and out of home in 2022 (latest 2023 Defra family food data) stood at 144.55g /person/wk. down -7.7% vs the previous year. This equates to just over one (1.03), 140g portion per person per week. This means that most people are still only eating around half of the amount of seafood recommended by health professionals.

2 Retail Seafood returns to accelerated decline.

With rising interest rates and concern over Ukraine,and the escalating Middle East Crisis, 2023 was a tough year for seafood. But the category began to grow volumes in the latter half of the year returning to growth (just) in early 2024, driven by growth in frozen fish fingers..

3 Foodservice seafood fails to recover servings

Seafood recovery in foodservice has remained slower than expected through 2022 and 2023 due to concern over personal finances and high inflation on menu prices resulting in seafood servings still 20% behind pre COVID-19 levels as consumers eat out less to save money and trade down to cheaper proteins.

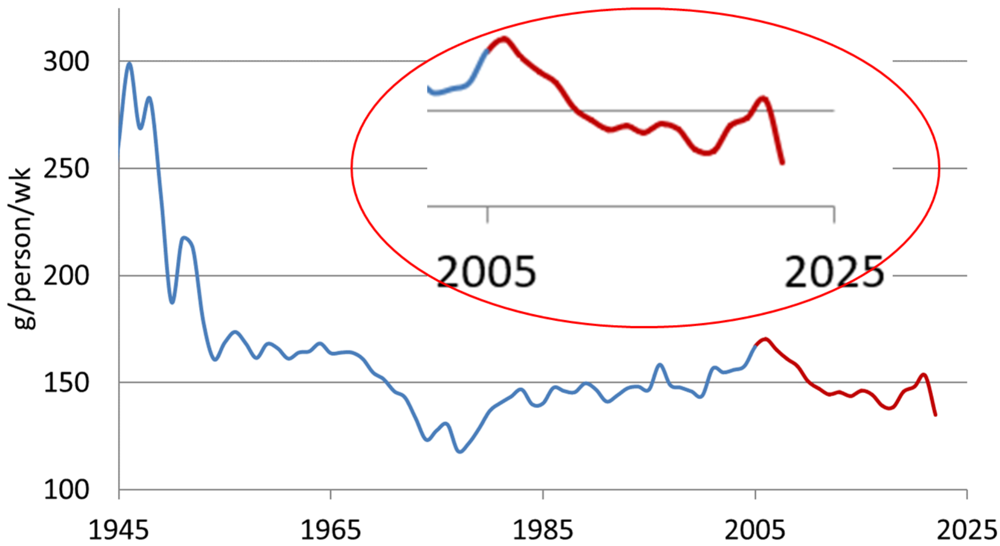
Long term trends in Seafood Consumption

The Defra Family Food 'in home' dataset offers the best insight into long term seafood consumption trends. The most recent data released 26th October 2023, covers UK consumption to 2022.

Seafood consumption 'in home' (which includes retail purchases and takeaways eaten in home) was at its peak (300g per person per week) just after the Second World War, as other proteins were still rationed. Consumption then declined, to its lowest level to date in the mid 1970's, coinciding with the UK falling into recession.

Seafood consumption began to rise throughout the 1980s as Britain became more prosperous; helped by a growing awareness of the health benefits of seafood, and technological breakthroughs in aquaculture bringing species including salmon and warm water prawns into the mainstream resulted in the start of a significant move away traditional whitefish species to farmed seafood which has continued to the present day. The 2021 uptick in 'in home" consumption was due to a 10% boost in retail sales because of COVID-19 and the virtual shutdown of foodservice. However, by 2022, the return to decline can already be seen.

Defra Long Term 'In Home' Seafood Consumption Trends (1945 to 2022)

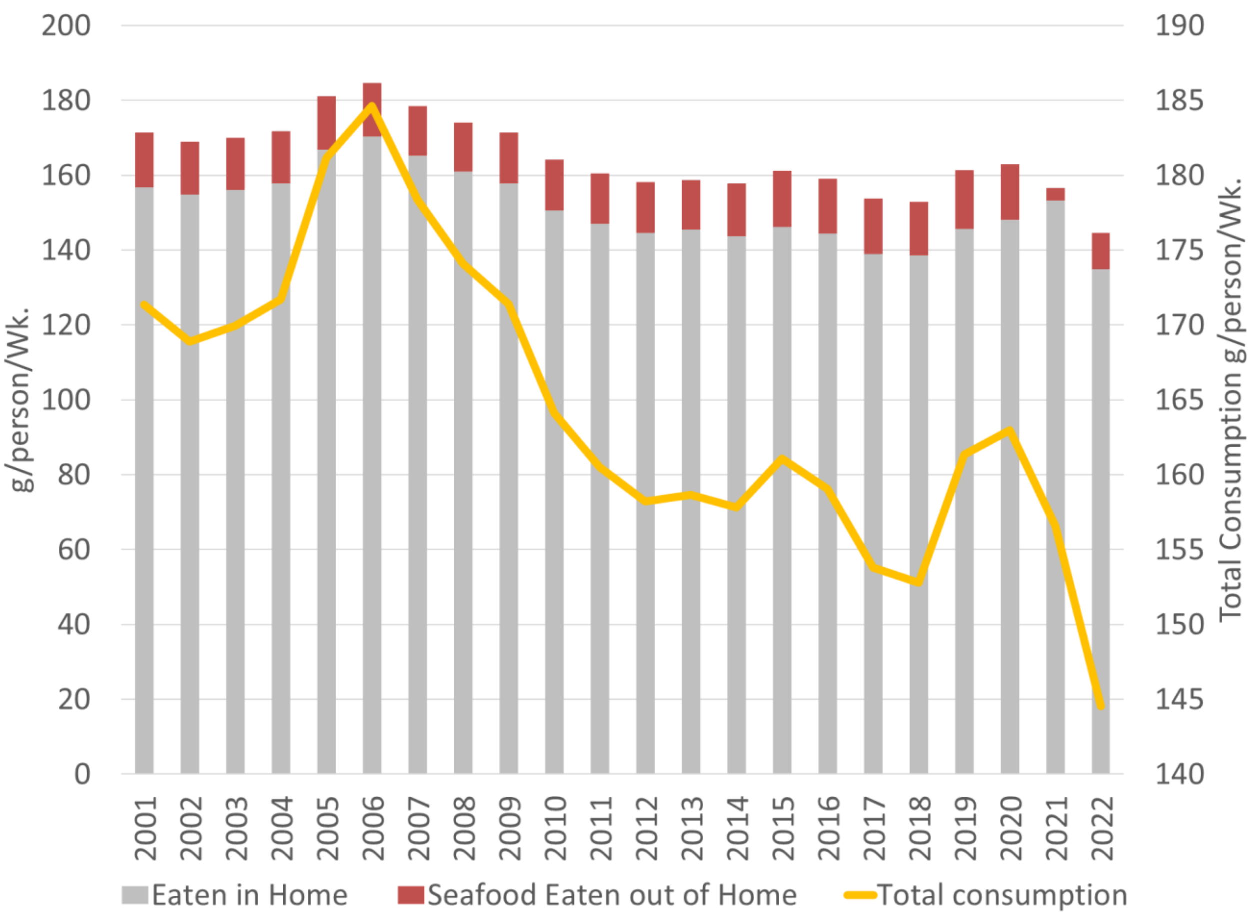


(Defra Family Food)

From 2001, Defra family food also captures information on UK seafood eaten out of home, enabling both in and out of home to be combined to give a more complete picture of seafood consumption. The ‘out of home’ component is relatively small and has stayed constant since 2001 at around 15g/person/wk. However, the impact of COVID-19 closing a high proportion of foodservice outlets resulted in this plummeting by 80% to just 3g/person/wk. in 2021.

The 17.3% total fall in seafood consumption from 2006 to 2018 was predominantly down to a drop in ‘in home’ consumption. Seafood consumption started to recover in 2019 and then received a significant boost from COVID-19 increasing retail meal occasions in 2020. Post COVID-19, rising inflation and the impact of the cost of living crisis, meant seafood servings in foodservice remained flat, hovering around -20% lower than pre COVID-19 levels and retail shoppers trading out of relatively expensive seafood into cheaper proteins. As a result, seafood consumption entered a period of accelerated decline at around -5% per year from 2020 -2022.

DEFRA Total Seafood Consumption 2001 to 2022



(Defra Family Food)

Benchmarking seafood consumption

The Defra Family Food dataset is the UK seafood consumption benchmark. Latest data released in October 2023 shows that in 2022, total seafood consumption (both in and out of home) fell to 144.5g /person/wk. down -7.7% vs the previous year. This equates to just over one (1.03), 140g portion per person per week. This means that most people are still only eating around half of the amount of seafood recommended by health professionals.

Total UK Seafood Consumption 2022 (Defra Family Food)

	2022 (g/person/ wk)	% Chg vs last Year (21 vs 22)	% Chg vs Pre COVID-19 ('19 vs 22)	% Chg vs 2006 ('06 vs 22)
SEAFOOD CONSUMPTION IN HOME	134.96	-11.93	-7.37	-20.75
SEAFOOD CONSUMPTION OUT OF HOME	9.59	185.30	-38.68	-33.25
TOTAL SEAFOOD CONSUMPTION (grams/person/week)	144.55	-7.70	-10.41	-21.72
PORTIONS/ PERSON/ WEEK (140g portion)	1.03	-7.70	-10.41	-21.72

(Defra Family Food)

Because of the protein and large number of essential nutrients contained in fish and shellfish, many experts recommend that we try to eat at least two portions of seafood every week. This recommendation has been made by the Scientific Advisory Committee on Nutrition (SACN), which advises the Food Standards Agency (FSA).

The SACN also suggests that at least one of our weekly portions of seafood should be oil-rich, such as trout, mackerel, or herring. By encouraging the public to increase their consumption by this achievable amount, the nation's general health would improve.

A study in 2020* estimated that the savings associated with increased seafood consumption on reducing a range of cancers, diabetes and heart disease in England alone, could be significant.

'The economic benefits from the number of preventable cases as a result of increasing seafood consumption to two portions a week across the whole of England is estimated to exceed £24m/week or £1.3 bn per year under Approach 1, the most conservative approach. Under Approach 2, a higher estimate of £3.5bn per year'

Realistically seafood consumption needs to double to achieve this. A challenging but not impossible target for a concerted, industry wide category led approach to drive frequency of consumption through raising awareness of the unique health benefits of seafood, along with tackling common seafood barriers and misconceptions.

Retail trends

Around 70% of seafood consumed is sold through retail. The long term data available to Seafish is GB excluding discounters shows a -25% consumption decline in the 10 years to COVID-19, equating to around £5.5bn lost out of retail seafood sales. However, this a worst case scenario as discounters have been growing share and seafood sales. From 2016, UK data including discounters has been available which will be used going forward.

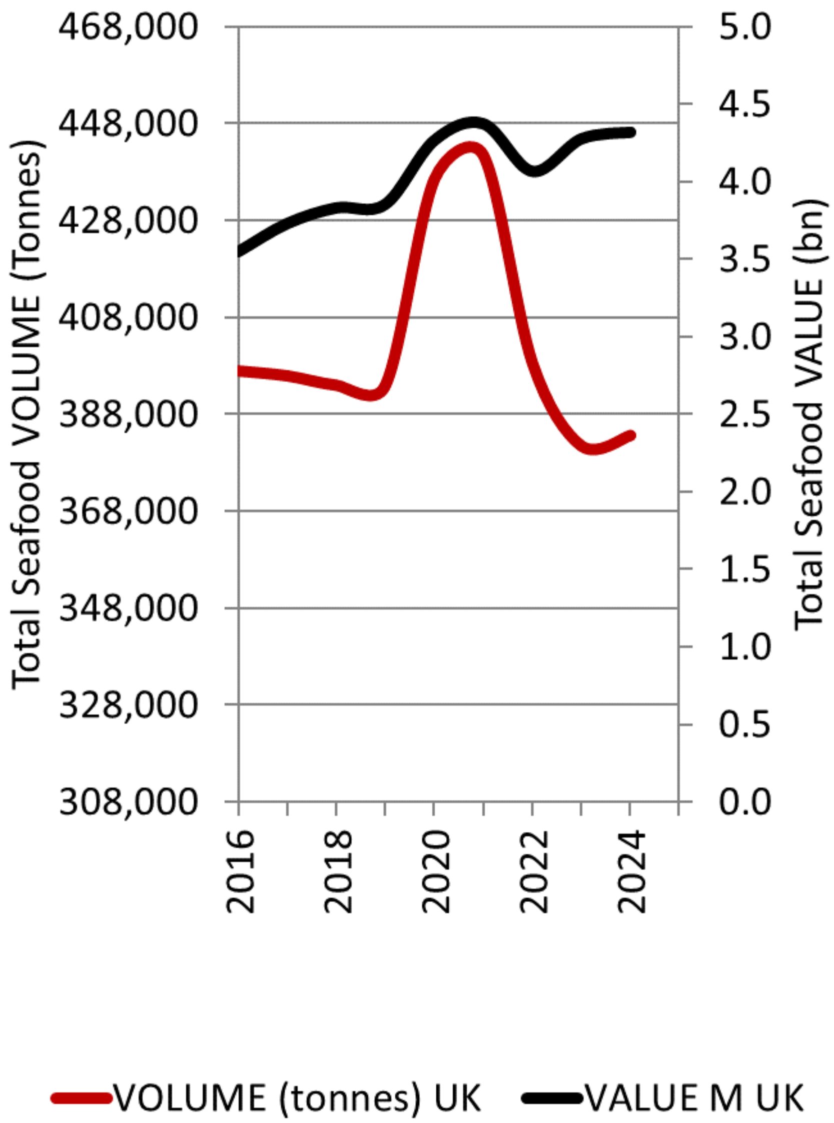
Prior to COVID-19, typically only chilled seafood exhibited volume growth. In 2020 COVID-19 panic buying and home working, school closures and restrictions on foodservice resulted in significantly more in home meal occasions briefly boosting retail seafood sales by around 10%. Post COVID-19, any short periods of volume growth have typically come from frozen and ambient seafood. Frozen natural, prepared, and frozen coated seafood such as breaded, battered, cakes and fingers grew strongly. As a result, species, used in coated products such as Alaskan pollack. saw strong volume growth.

With rising inflation and concern over the Ukraine Crisis the past couple of years has been tough for seafood, as shoppers traded down to the cheapest seafood options, tinned tuna and fish fingers. Falling seafood volumes in retail began to slow in the latter half of 2023, and seafood returned to full growth in early 2024.

In the 52 weeks to the end of March 2024, UK retail sales were worth £4.32bn (+5.3%), with a consumption volume of 383,533 tonnes (+1.0%) and an average price of £11.25kg (+4.3%). Seafood inflation at point of sale has been steadily falling over the past year, currently sitting at +4.3% at the end of March 2024, remaining modest compared to the 7% for other foodstuff.

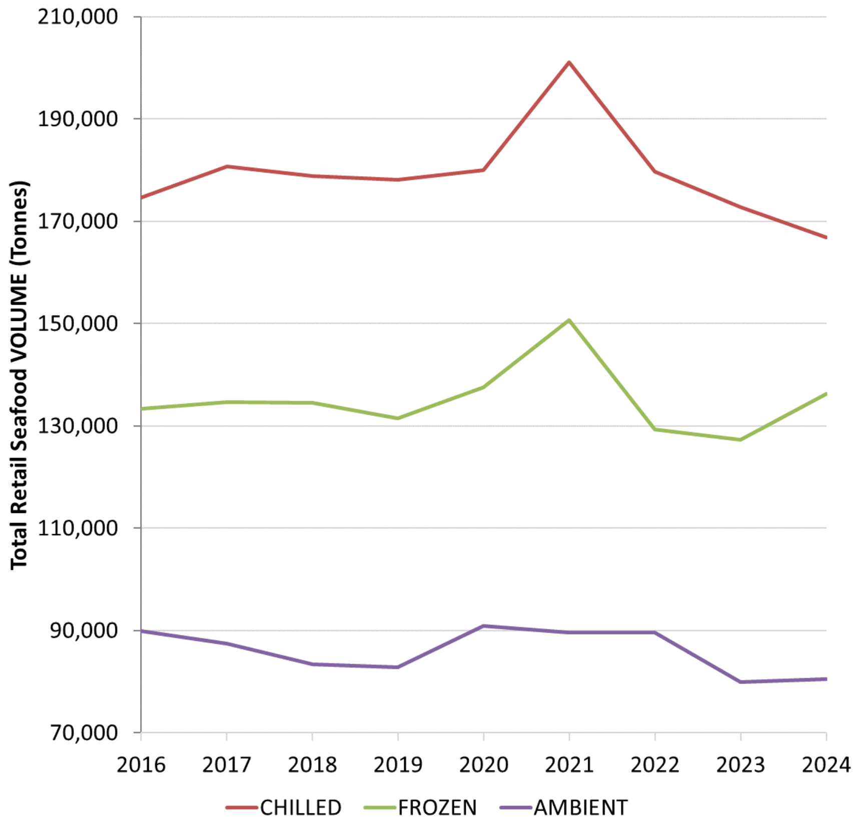
In retail, the percentage of pre-packaged seafood sold has increased this year to 98%, with shoppers reporting wanting to be in and out of store as quickly as possible. The move to prepack is not a new trend; occurring several decades ago and not because of additional counter closures due to COVID-19. In 2019, pre COVID-19, the volume share of prepack seafood stood at 91%. This grew to 96% in 2020 and stood at 97% in 2021. This puts more emphasis on the need to provide prepack products which meet shopper requirements around freshness, trending flavours, minimizing handling/preparation, and ease of cook.

UK retail total seafood consumption trends 2024



(NielsenIQ)

UK Retail Seafood Sector Consumption Trends to 2024



	UK volume tonnes	% Chg vs last Year (23 vs 24)	% Chg vs Pre COVID-19 ('19 vs 24)	% Chg vs 2006 ('16 vs 24)
TOTAL SEAFOOD	383,533	1.0	-2.2	-3.6
CHILLED	166,865	-3.4	-6.3	-4.4
FROZEN	136,220	7.1	3.6	2.2
AMBIENT	80,448	0.7	-2.8	-10.4

(NielsenIQ)

Seafood purchases in foodservice

Seafood consumption declined for many years after the financial crisis in 2007/8 but started to pick up around 2016/17, driven by sales in the cheaper quick service and independent fish & chip shop channels. However, the impact of COVID-19 resulted in many operators remaining closed for long periods. All channels were hit hard, particularly the workplace and travel & leisure. The quick service channel fared the best due to the independent nature of takeaways and fish & chip shops, some of which remained open. However, volume recovery has remained slower than expected through 2022 and 2023 hampered by heavy inflation of around 30%. In December 2023, seafood in foodservice was worth an estimated £5.9bn (+38%), with servings of 988m (+6.4) equating to around 138,000 tonnes based on an industry 140g portion.

Concern over personal finances and high inflation on menu prices has contributed to seafood servings remaining around 20% behind pre COVID-19. Consumers are likely to eat out less to save money and when they do, trade down to cheaper proteins. Analysts predicted foodservice to return to pre-covid levels by the end of 2022, this is now unlikely to happen for several years.

Seafood outlook

The next five years could remain challenging for seafood consumption, especially the contribution from foodservice. Before the War in Gaza, escalated UK Grocery was predicted to recover and grow volume sales by around 5% in 2024, but growing Geo-political tensions may negatively impact on the supply and cost of food, energy and other commodities, which resulted in growth expectations to be cut back to less than 1%.

Although currently (just) in full growth, the general trend for seafood is likely to be price driven growth until the cost of living crisis eases. The frozen seafood sector may slip in and out of volume growth as shoppers continue to try to save money buying coated seafood. Sales of other retail segments such as prepared/sauce seafood and foodservice oriented seafood products may benefit as a result of shopper sentiment reporting that 75% of shoppers plan to eat out less in 2024
.

Over the next 5 years, overall seafood consumption (Defra family food) may continue to decline at a rate similar to that observed post 2008 financial crisis at around 15% or 25g/person/wk every five years. This rate could increase if the cost of living crisis deepens.

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Sources: (%) values represent change from the previous year unless otherwise stated

- Defra Family Food Datasets 2021/22
- Circana 2023
- NielsenIQ Scantrack – UK EPOS from key retailers (including composite data from discounters Aldi & Lidl and N. Ireland) excludes seafood sandwiches
- NielsenIQ Homescan – GB (including discounters) consumer panel of 15,000 households excludes seafood sandwiches
- The socio-economic impacts of increased seafood consumption RPA & co-consultant

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For more information please contact:
Richard Watson
Market Analyst

T: +44 (0) 1472 252 331
E: richard.watson@seafish.co.uk
W: Latest MI retail publications
W: MI secure area login

Seafish
Seafish Origin Way,
Europarc,
Grimsby,
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